

## Chapter 8 - Food Instruments/Packages

### Overview

#### Introduction

Special supplemental nutritious foods (food instruments/packages) is the final benefit for participants on the WIC Program.

#### In this Chapter

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## Supplemental Food Benefits and Food Packages

Policy Number 8-1  
Effective Date: October 1, 1999

### Policy

It is the policy of the Montana WIC Program that quantities and types of supplemental foods, appropriate to age and dietary needs, be prescribed and issued monthly (food packages) to certified eligible participants during one certification period.

**Note: Prorated food packages are based upon the amount issued in the full food package. Whenever possible at least one item from each group has been issued in the food package.**

### Exceptions to monthly issuance

The local agency Competent Professional Authority (CPA) may elect to prescribe up to 3 months' food packages to non-high risk participants, as defined locally, at one issuance.

**Note: The required minimum of two nutrition education contacts in one six month period must be maintained.**

### Food Packages

Only specified foods may be issued in food packages. The table attached to this policy lists the "Montana WIC Food Packages".

### Special Notes on Milk

Cow's milk is not authorized for infants under 12 months of age. After 12 months of age, whole milk is provided up to age 24 months, then reduced fat milk is issued unless the CPA authorizes whole milk.

Goat's milk is not authorized for infants under 12 months of age. For children and women, Meyenberg brand goat's milk can be provided as a special formula with a physician's prescription. See Policy #8-7 for information on special formulas, including goat's milk.

Acidophilus or lactose-reduced milk may be issued at the CPA's discretion for women and children 2 years of age or older.

## **Food Benefits and Food Packages**

### **Supplemental Formula Issued to a Breastfeeding Infant**

Food Packages have been designed for the issuance of supplemental formula to a breastfeeding infant. Formula in these food packages is in powdered form to reduce waste due to spoilage from infrequent use.

To determine the amount of supplemental formula to issue use guidance in Attachment B.

### **Food Package Descriptions**

Food packages for non-homeless participants are described in Attachment A to this policy.

Food packages for homeless participants are described in Attachment B to this policy.

### **Tailoring Food Packages**

The food package prescribed by the CPA will be dependent on the nutrition needs of the participant.

The participant/guardian may request a reduction in the amount of foods provided so that the food package issued will parallel as closely as possible the food that is actually purchased and used by the participant.

Note: The reason for tailoring food packages must always be documented in the participant chart whether the tailoring is done based on the CPA's judgement or at the request of the participant/guardian.

### **Authority**

### **Approval Signature**

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Terry Krantz, Manager, Nutrition Section

## **Attachment A, Non-homeless Food Package Descriptions**

**Policy Number 8-2**  
**Effective Date: October 1, 1999**

### **Infants 0-4 months (Food Package I)**

- ♦ Concentrate or powdered iron-fortified formula.
- ♦ Iron-fortified ready-to-feed formula may be issued only if:
  - the CPA (Competent Professional Authority) determines and documents that there is an unsanitary or restricted water supply
  - that there is poor refrigeration or
  - that the person caring for an infant may have difficulty in correctly preparing concentrate liquid or powdered formula.

Note: No formula may be issued to the infant of a woman issued an enhanced breastfeeding food package (Food Package VII).

### **Infants 4-6 months (Food Package IIA)**

- ♦ Concentrate or powdered iron-fortified formula
- ♦ Infant cereal, any choice of dry, single ingredient (WIC-approved)
- ♦ Iron-fortified ready-to-feed formula may be issued only if:
  - the CPA (Competent Professional Authority) determines and documents that there is an unsanitary or restricted water supply
  - that there is poor refrigeration or
  - that the person caring for an infant may have difficulty in correctly preparing concentrate liquid or powdered formula.

Note: No formula may be issued to the infant of a woman issued an enhanced breastfeeding food package (Food Package VII). The infant may be issued infant cereal.

### **Infants 6-12 months (Food Package IIB)**

- ♦ Concentrate or powdered iron-fortified formula
- ♦ Infant cereal, any choice of dry, single ingredient (WIC-approved)
- ♦ Apple juice (WIC approved) and/or one other frozen juice (WIC approved)

Special note: NO INFANT JUICE.

- ♦ Iron-fortified ready-to-feed formula may be issued only if:
  - the CPA (Competent Professional Authority) determines and documents that there is an unsanitary or restricted water supply

- that there is poor refrigeration or
- that the person caring for an infant may have difficulty in correctly preparing concentrate liquid or powdered formula.

**Note: No formula may be issued to the infant of a woman issued an enhanced breastfeeding food package (Food Package VII). The infant may be issued infant cereal and frozen juice.**

**Children 1-5 yrs and Women w/Special Dietary Needs (Food Package III)**

- ◆ Formula with a doctor's prescription and the State WIC Nutritionist's or local WIC program Registered Dietitian's approval.

Note: Prescriptions are valid for the certification period or a shorter time period specified. All food packages containing special formulas have been calculated to provide the allowed maximum based on the type (powdered, concentrate, RTF) and container size.

- ◆ Frozen juice (WIC approved)
- ◆ Cereal, cold and/or hot (WIC approved)

**Children 1-5 yrs (Food Package IV)**

Children to age 24 months:

- ◆ Whole fluid fresh milk

**Note: Evaporated whole milk may be issued in place of fluid whole milk. No skim, 1% or 2% milk may be issued except under the following circumstance:**

*a child less than 2 years of age who is gaining at an accelerated rate and is above the 95th percentile weight for height and it is requested by a team of an MD and an RD (request made by one of the team members). The child must currently be followed by an RD outside of the WIC Program. The request must be in writing with the justification stated, similar in format to a prescription for a special formula.*

Children 2-5 years:

- ◆ Reduced fat fluid fresh milk
- ◆ Evaporated lowfat/skim milk or lowfat/nonfat dry milk powder may be issued in place of reduced fat fluid fresh milk.

**Note: Whole fluid fresh milk and evaporated whole milk may be issued with CPA approval and justification documented.**

- ◆ Cheese may be substituted for milk in the amount of one (1) pound per participant per month. (1 pound cheese = 3 quarts milk.)
- ◆ Frozen juice (WIC approved) or single strength canned juice (WIC approved)

- ◆ Eggs
- ◆ Cereals, cold and/or hot (WIC approved)
- ◆ Peanut butter or dried beans/peas, alternating every other month

**Pregnant and Breastfeeding Women (Food Package V)**

- ◆ Reduced fat fluid fresh milk
- ◆ Evaporated lowfat/skim milk or lowfat/nonfat dry milk powder may be issued in place of reduced fat fluid fresh milk.

Note: Whole fluid fresh milk and evaporated whole milk may be issued with CPA approval and justification documented.

- ◆ Cheese may be substituted for milk in the amount of one (1) pound or two (2) pounds per participant per month. (1 pound cheese = 3 quarts milk.)
- ◆ Frozen juice (WIC approved) or single strength canned juice (WIC approved)
- ◆ Eggs
- ◆ Cereals, cold and/or hot (WIC approved)
- ◆ Peanut butter or dried beans/peas, alternating every other month

**Postpartum Women (Food Package VI)**

- ◆ Reduced fat fluid fresh milk
- ◆ Evaporated lowfat/skim milk or lowfat/nonfat dry milk powder may be issued in place of reduced fat fluid fresh milk. Note: Whole fluid fresh milk and evaporated whole milk may be issued with CPA approval and justification documented.
- ◆ Cheese may be substituted for milk in the amount of one (1) pound per participant per month. (1 pound cheese = 3 quarts milk.)
- ◆ Frozen juice (WIC approved) or single strength canned juice (WIC approved)
- ◆ Eggs
- ◆ Cereals, cold and/or hot (WIC approved)

**Note: This food package contains no peanut butter or dried beans/peas. This food package is issued only to women certified as postpartum. The final food package issued to a woman certified as pregnant (after delivery) is Food Package V or Food Package VII if breastfeeding and no formula is provided by WIC.**

**Enhanced Breastfeeding Women (Food Package VII)**

Note: The infant of a woman issued this breastfeeding food package may not be issued formula.

- ◆ Reduced fat fluid fresh milk

♦\_Evaporated lowfat/skim milk or lowfat/nonfat dry milk powder may be issued in place of reduced fat fluid fresh milk.

Note: Whole fluid fresh milk and evaporated whole milk may be issued with CPA approval and justification documented.

♦\_One pound of cheese is issued with each food package (does not influence the total amount of milk issued). Additional cheese beyond this standard amount may be substituted for milk in the amount of one (1) pound or two (2) pounds per participant per month. (1 pound cheese = 3 quarts milk.)

- ♦ Frozen juice (WIC approved) or single strength canned juice (WIC approved)
- ♦ Eggs
- ♦ Cereals, cold and/or hot (WIC approved)
- ♦ Peanut butter
- ♦ Dried beans/peas
- ♦ Tuna, water pack
- ♦ Carrots, fresh, canned, frozen

Note: See the “Food Package Guidelines” tables included with this policy for guidance on issuance of allowed foods and forms. See the “Breastfed Infant Food Package Determination” form to calculate the amount of supplemental formula when requested for a breastfeeding pair.

## Reference

## Authorized Signature

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Terry Krantz, Manager, Nutrition Section

MONTANA WIC FOOD PACKAGES

	Infant 0-4 Months	Infant 4-6 Months	Infant 6-12 Months	Child/Woman Special Dietary Needs
Iron-fortified formula 13 oz. concentrate or 1 pound powdered or 14 ounce powdered or 32 oz. ready-to-feed	31 cans or 8 cans or 9 cans or 25 cans***	31 cans or 8 cans or 9 cans or 25 cans***	31 cans or 8 cans or 9 cans or 25 cans***	up to 35 cans or up to 9 cans or up to 10 cans or up to 28 cans***
Infant Cereal Single Ingredient, dry		3-8 oz. boxes	3-8 oz. boxes	
Cereal, iron-fortified WIC-Approved				up to 36 oz.
Juice, 100% unsweetened WIC-Approved			2-12 oz. cans frozen	3-12 oz. cans frozen

Special Notes:

Container sizes of powdered infant formula:

Enfamil with Iron	1 pound	Pregestimil	1 pound
ProSobee	14 ounces	Portagen	1 pound
Nutramigen	1 pound		

For sizes of powdered infant formula not listed call the State Office for information and conversion amounts.

\*\*\*Ready-to-feed formula may only be issued under special conditions as described above in this policy.

Revised February 1, 1993

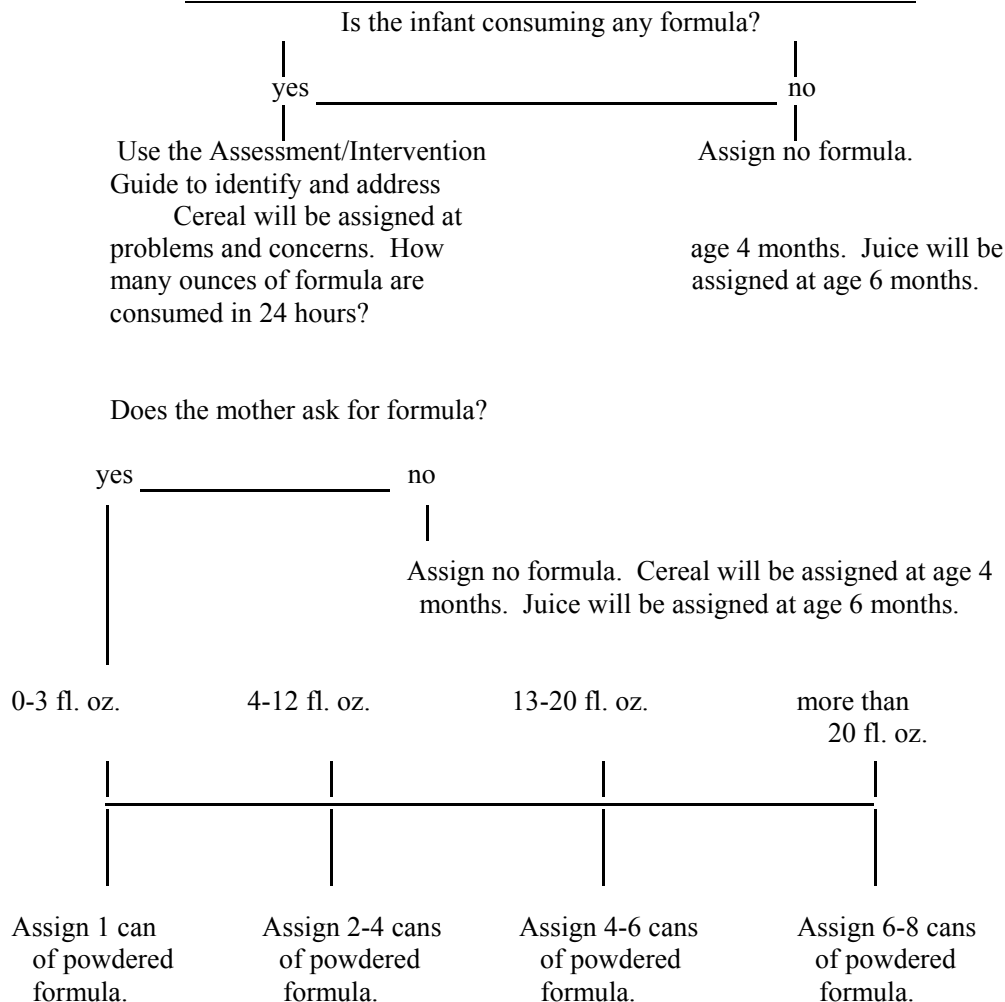


MONTANA WIC FOOD PACKAGES

	Child 12 - 24 Months	Child 24 Mo. - 4 Years	Woman, Pregnant or Breastfeeding	Woman Postpartum	Woman Enhanced Breastfeeding
Fresh Milk and Cheese	6 gallons whole milk or 5 gallons, 1 quart whole milk, 1 pound cheese	6 gallons Reduced Fat Milk or 5 gallons, 1 quart Reduced Fat milk, 1 pound cheese	7 gallons Reduced Fat Milk or 6 gallons, 1 quart milk, 1 pound cheese or 5 1/2 gal. milk and 2 lbs. cheese	6 gallons Reduced Fat Milk or 5 gallons, 1 quart milk, 1 pound cheese or 4 1/2 gal. milk and 2 lbs. cheese	7 gallons Reduced Fat Milk and 1 pound cheese or 6 gallons and 1 quart Reduced Fat Milk, 2 pounds cheese or 5 1/2 gallons Reduced Fat Milk and 3 lbs. cheese
Eggs	2 dozen	2 dozen	2 dozen	2 dozen	2 dozen
Juice, Unsweetened WIC-Approved	6-12 oz. cans frozen or 6-46 oz. cans single strength	6-12 oz. cans frozen or 6-46 oz. cans single strength	6-12 oz. cans frozen or 6-46 oz. cans single strength	4-12 oz. cans frozen or 4-46 oz. cans single strength	7-12 oz. cans frozen or 7-46 oz. cans single strength
Cereal, iron- fortified WIC-Approved	up to 36 oz.	up to 36 oz.	up to 36 oz.	up to 36 oz.	up to 36 oz.
Peanut Butter or Dried beans/peas	1-18 oz. jar peanut butter or 1 pound dried beans/peas Alternating every other month	1-18 oz. jar peanut butter or 1 pound dried beans/peas Alternating every other month	1-18 oz. jar peanut butter or 1 pound dried beans/peas Alternating every other month		1-18 oz. jar peanut butter <u>and</u> 1 pound dried beans/peas
Tuna					4-6.0 to 6.5 oz. cans
Carrots					2-1 pound containers/bags

Revised February 14, 1994

### BREASTFED INFANT FOOD PACKAGE DETERMINATION



Cereal will be assigned at age 4 months. Juice will be assigned at age 6 months.

Remember that the Enfamil with Iron powdered is a 16 oz. can and ProSobee powdered is a 14 oz. can. Therefore, fewer cans of Enfamil with Iron would be issued in comparison to ProSobee for the same amount of reconstituted formula.

This is **rarely** warranted except in the following situations:

- 1) the infant has a specific medical condition that increases the need for nutrients or calories;
- 2) the infant enters the final stages of weaning; or
- 3) the infant has a working mother (greater than 20 hours per week - Pediatrics Vol. 87 No. 3, March 1991) who can provide only 1-2 nursings per day.

In **extremely rare** circumstances, the maximum number of cans of formula may need to be issued.

Adapted by the Montana WIC Program 6/1992 from the Kansas WIC Program "Food Package Tailoring" 1991.  
Revised 7/1995

## **Attachment B, Homeless Food Package Descriptions**

**Policy Number 8-3**  
**Effective Date: October 1, 1997**

### **Background**

A number of the standard and tailored food packages may meet the needs of the homeless participant but because cooking facilities, refrigeration, and acceptable storage areas may not be available for these participants, special consideration must be given in prescribing and issuing the food package. The types of supplemental foods prescribed must take into account the cooking and storage facilities available to the participant while residing in the temporary shelter.

### **Modifications**

Modifications in both the types and amounts of foods may be required to assure that the WIC supplemental foods can be safely stored and utilized. Several food packages have been designed for the homeless participant with special requirements. These food packages are found in the number series 06000. A FOOD PACKAGE REQUEST form may be submitted to request a different food package than what is available.

### **Useful Sizes**

When adequate refrigeration or dry storage is limited, and a homeless food package is chosen, judgment should be used to provide those size packages most useful for the participant(s).

Example: A family of four WIC participants with no refrigeration or stable residence is issued canned beans. The table indicates eight 8-ounce cans per participant, these participants may find four 16-ounce cans more appropriate.

Keep in mind that the food package issued is prescribed for the WIC participant(s) and not necessarily for all family members. The goal of this part of the food package policy is to provide food in a package size that facilitates usage while avoiding the problems of spoilage or inadequate storage availability that homeless participants may experience.

### **Retailers**

Contact local retailers to determine if the prescribed items are available before issuing the food instruments.

## Homeless Food Packages

### Infants 0-4 months (Food Package I)

BREASTFEEDING WILL BE ENCOURAGED. Breastfeeding is the healthiest, easiest and safest way to feed the infant, especially given the possible lack of refrigeration and facilities for proper sterilization of bottles.

- ◆ Powdered iron-fortified formula.

Note: Powdered iron-fortified formula should be issued.

- Instruct the mother to prepare only one bottle of formula at a time due to lack of refrigeration.
- Playtex nursing bottles can be recommended to minimize sterilization of equipment.
- Use of bottled water is recommended if there is concern about the safety of the water supply.

- ◆ Iron-fortified ready-to-feed formula may be issued only if:

- the CPA (Competent Professional Authority) determines and documents that there is an unsanitary or restricted water supply
- that there is poor refrigeration or
- that the person caring for an infant may have difficulty in correctly preparing concentrate liquid or powdered formula.

**Note: Prior Approval must be given by the state WIC Program before ready-to-feed formula is issued in 8 ounce cans for infants under 4 months of age. Keep in mind that a 32 ounce container of ready-to-feed formula can be easily contaminated without refrigeration.**

Note: No formula may be issued to the infant of a woman issued an enhanced breastfeeding food package (Food Package VII).

### Infants 4-6 months (Food Package IIA)

BREASTFEEDING WILL BE ENCOURAGED. Breastfeeding is the healthiest, easiest and safest way to feed the infant, especially given the possible lack of refrigeration and facilities for proper sterilization of bottles.

- ◆ Concentrate or powdered iron-fortified formula
- ◆ Infant cereal, any choice of dry, single ingredient (WIC-approved)
- ◆ Iron-fortified ready-to-feed formula may be issued only if:
  - the CPA (Competent Professional Authority) determines and documents that there is an unsanitary or restricted water supply

- that there is poor refrigeration or
- that the person caring for an infant may have difficulty in correctly preparing concentrate liquid or powdered formula.

**Note: Keep in mind that a 32 ounce container of ready-to-feed formula can be easily contaminated without refrigeration.**

**Note: No formula may be issued to the infant of a woman issued an enhanced breastfeeding food package (Food Package VII).**

#### **Infants 6-12 months (Food Package IIB)**

- ◆ Concentrate or powdered iron-fortified formula
- ◆ Infant cereal, any choice of dry, single ingredient (WIC-approved)
- ◆ 4.2 ounce jars of infant juice
- ◆ Iron-fortified ready-to-feed formula may be issued only if:
  - the CPA (Competent Professional Authority) determines and documents that there is an unsanitary or restricted water supply
  - that there is poor refrigeration or
  - that the person caring for an infant may have difficulty in correctly preparing concentrate liquid or powdered formula.

**Note: Keep in mind that a 32 ounce container of ready-to-feed formula can be easily contaminated without refrigeration.**

**Note: No formula may be issued to the infant of a woman issued an enhanced breastfeeding food package (Food Package VII).**

#### **Children 1-5 yrs and Women w/Special Dietary Needs (Food Package III)**

- ◆ Powdered formula when refrigeration is lacking. See Policy 8-7 for instructions regarding the issuance of Food Package III.
- ◆ Frozen juice (WIC approved) or single serving 6 ounce cans of WIC approved juices may be issued if no or very limited refrigeration is available.
- ◆ Cereal, cold and/or hot (WIC approved)

#### **Children 1-5 yrs (Food Package IV)**

If proper refrigeration is lacking, fresh fluid milk must be excluded from the package.

Children to age 24 months:

- ◆ Evaporated whole milk in 5 ounce cans or UHT (ultra high temperature) whole milk may be issued.

Note: Evaporated whole milk in 12 ounce cans may be issued if proper refrigeration and storage techniques are observed when mixing, storing and using the milk.

Children 2-5 years:

- ◆ Powdered milk may be issued. Participants should be instructed on how to use powdered milk, and the importance of preparing one glass at a time.
- ◆ Evaporated skim milk in 12 ounce cans may be issued if proper refrigeration and storage techniques are observed when mixing, storing and using the milk.
- ◆ Cheese is not recommended if no refrigeration is available. However, cheese may be substituted for milk in the amount of one (1) pound per 3 quarts milk.
- ◆ Frozen juice (WIC approved) or single strength canned juice (WIC approved) may be issued. Single serving 6 ounce cans of WIC approved juices may be issued if no or very limited refrigeration is available.
- ◆ Eggs may be issued if refrigeration and cooking facilities are available. One 18 ounce jar of peanut butter (in addition to the normal allowance) may be substituted for 2 dozen eggs when no refrigeration or cooking facilities are available.
- ◆ Cereals, cold and/or hot (WIC approved)
- ◆ Peanut butter or dried beans/peas may be issued. Homeless participants may choose whichever best fits their situation and needs. If no cooking facilities are available, canned beans may be substituted at the rate of four 16 ounce cans of beans when dry storage is available. Smaller 8 ounce cans of beans may be issued when no stable residence is available (living on the street, for example).

**Pregnant and Breastfeeding Women (Food Package V)**

Note: Exclude fluid fresh milk from the food package IF proper refrigeration is lacking.

- ◆ Powdered milk may be issued. Participants should be instructed on how to use powdered milk, and the importance of preparing one glass at a time.
- ◆ Evaporated skim milk in 12 ounce cans may be issued if proper refrigeration and storage techniques are observed when mixing, storing and using the milk.
- ◆ Cheese is not recommended if no refrigeration is available. However, cheese may be substituted for milk in the amount of one (1) pound per 3 quarts milk.
- ◆ Frozen juice (WIC approved) or single strength canned juice (WIC approved) may be issued. Single serving 6 ounce cans of WIC approved juices may be issued if no or very limited refrigeration is available.
- ◆ Eggs may be issued if refrigeration and cooking facilities are available. One 18 ounce jar of peanut butter (in addition to the normal allowance) may be substituted for 2 dozen eggs when no refrigeration or cooking facilities are available.
- ◆ Cereals, cold and/or hot (WIC approved)
- ◆ Peanut butter or dried beans/peas may be issued. Homeless participants may choose whichever best fits their situation and needs. If no cooking facilities are available, canned beans may be substituted at the rate of four 16 ounce cans of beans when dry storage is available. Smaller 8 ounce cans of beans may be issued when no stable residence is available (living on the street, for example).

**Postpartum Women (Food Package VI)**

Note: Exclude fluid fresh milk from the food package IF proper refrigeration is lacking.

- ◆ Powdered milk may be issued. Participants should be instructed on how to use powdered milk, and the importance of preparing one glass at a time.
- ◆ Evaporated skim milk in 12 ounce cans may be issued if proper refrigeration and storage techniques are observed when mixing, storing and using the milk.
- ◆ Cheese is not recommended if no refrigeration is available. However, cheese may be substituted for milk in the amount of one (1) pound per 3 quarts milk.
- ◆ Frozen juice (WIC approved) or single strength canned juice (WIC approved) may be issued. Single serving 6 ounce cans of WIC approved juices may be issued if no or very limited refrigeration is available.
- ◆ Cereals, cold and/or hot (WIC approved)
- ◆ Eggs may be issued if refrigeration and cooking facilities are available. One 18 ounce jar of peanut butter (in addition to the normal allowance) may be substituted for 2 dozen eggs when no refrigeration or cooking facilities are available.

### **Enhanced Breastfeeding Women (Food Package VII)**

Note: Exclude fluid fresh milk from the food package IF proper refrigeration is lacking.

- ◆ Powdered milk may be issued. Participants should be instructed on how to use powdered milk, and the importance of preparing one glass at a time.
- ◆ Evaporated skim milk in 12 ounce cans may be issued if proper refrigeration and storage techniques are observed when mixing, storing and using the milk.
- ◆ Cheese is not recommended if no refrigeration is available. However, cheese may be substituted for milk in the amount of one (1) pound per 3 quarts milk.
- ◆ Frozen juice (WIC approved) or single strength canned juice (WIC approved) may be issued. Single serving 6 ounce cans of WIC approved juices may be issued if no or very limited refrigeration is available.
- ◆ Cereals, cold and/or hot (WIC approved)
- ◆ Eggs may be issued if refrigeration and cooking facilities are available. One 18 ounce jar of peanut butter (in addition to the normal allowance) may be substituted for 2 dozen eggs when no refrigeration or cooking facilities are available.
- ◆ Peanut butter may be issued.
- ◆ Dried beans/peas may be issued. If no cooking facilities are available, canned beans may be substituted at the rate of four 16 ounce cans of beans when dry storage is available. Smaller 8 ounce cans of beans may be issued when no stable residence is available (living on the street, for example).
- ◆ Tuna may be issued. If no refrigeration is available, eight 3.25 ounce cans may be issued.
- ◆ Carrots may be issued. If no refrigeration is available, four 8 ounce cans of carrots may be issued.

Note: See the “Homeless Food Package Guidelines” table included with this policy for guidance on issuance of allowed foods and forms according to availability of refrigeration, dry storage and cooking facilities.

**Reference**

**Authorized Signature**

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David L. Thomas, Nutrition Section Supervisor



HOMELESS FOOD PACKAGE GUIDELINES  
Based on Availability  
of  
Refrigeration, Dry Storage, and Cooking Facilities

Facilities	Formula	Milk	Cheese	Juice	Cereal	Eggs	Dried Beans/	Peanut Butter	Tuna	Carrots
Refrigeration, Dry Storage, and Cooking Facilities	Powdered or Concentrate	Fluid Evaporated or Powdered	Cheese as Part of Milk allotment or enhanced BF package	Canned or Frozen	Any WIC-Approved	Eggs	Dried Peas/ Beans	or Peanut Butter	4-6.0 to 6.5 oz.	Fresh or Canned  Frozen only if adequate space
Dry Storage and Cooking Facilities No Refrigeration	Powdered	Powdered*	Cheese may be issued with special instructions for use.	Canned	Any WIC-Approved	Substitute 1 jar (18 oz.) peanut butter for 2 doz. eggs	Dried Peas/ Beans	or Peanut Butter	8-3.25 oz. cans	Canned recommended  Fresh on request
Dry Storage Only	Powdered	Powdered*	No Cheese except for enhanced BF package	Canned	Cold Cereal, WIC-Approved	Substitute peanut butter, as above	4-16 oz cans of beans	or Peanut Butter	8-3.25 oz. cans	Canned recommended 4-8 oz.  Fresh on request
Dry Storage, but no stable residence (i.e., on foot)	Ready-to-feed in 4 oz. containers	Powdered*	No Cheese except for enhanced BF package	Individual serving containers of WIC-approved juice	Cold Cereal, WIC-Approved	Substitute peanut butter, as above	8-8 oz. cans of beans	or Peanut Butter	8-3.25 oz. cans	Canned recommended 4-8 oz.  Fresh on request
		*Evaporated milk may be issued with proper instructions for use without refrigeration					Note: Exclusively BF women would receive both dried beans and peanut butter.			

February 1, 1993

## Authorized Foods

**Policy Number** 8-4  
**Effective Date:** October 1, 2001

### Policy

It is the policy of the Montana WIC Program that only specific authorized foods will be issued in the Montana WIC Program.

### Authorized Foods

The attached table describes the currently authorized foods in the Montana WIC Program.

### Authority

### Approval Signature

Terry Krantz, Manager, Nutrition Section

Food	Description	Quantity Authorized
Infant Formula	Powdered	
	ENFAMIL, WITH IRON	16 oz
	PROSOBEE	14 oz
	ENFAMIL LACTOFREE	14 oz
	Liquid concentrate	
	ENFAMIL, WITH IRON	13 fl oz
	PROSOBEE	13 fl oz
	ENFAMIL LACTOFREE	13 fl oz
	Ready to Feed	
	ENFAMIL, WITH IRON	32 fl oz
	PROSOBEE	32 fl oz
	ENFAMIL LACTOFREE	32 fl oz
	Note: Poor water supply or inability of parent/guardian to properly mix concentrate or powdered formula must be documented to issue ready to feed formula.	
	Special use formulas	Information available from State WIC nutritionist

Food	Description	Quantity Authorized
Milk	Fluid, fresh	
PASTEURIZED AND FORTIFIED	Vitamin D added, WHOLE	1 gal, ½ gal, 1 qt
	Vitamin A & D added, 2%	1 gal, ½ gal, 1 qt
	Vitamin A & D added, 1%	1 gal, ½ gal, 1 qt
NO CHOCOLATE OR FLAVORED OR CALCIUM ADDED	Vitamin A & D added, SKIM	1 gal, ½ gal, 1 qt
	Vitamin A & D added, NONFAT OR FATFREE	1 gal, ½ gal, 1 qt
	Vitamin A & D added, LOWFAT, NONFAT SWEET ACIDOPHILUS	1 gal, ½ gal, 1 qt
	Vitamin A & D added, 1% LOWFAT, NONFAT LACTAID	1 qt
ORGANIC MILK	Horizon, FAT FREE, 1% or 2%	1 gal, ½ gal, 1 qt
	Organiz Valley, NONFAT, 2%	1 gal, ½ gal, 1 qt
Milk	Canned	
	Vitamin D added, WHOLE, EVAPORATED	12 oz
	Vitamin A & D added, LOWFAT, EVAPORATED	12 oz
	Vitamin A & D added, SKIM, EVAPORATED	12 oz
	Vitamin D added, GOAT MILK, EVAPORATED, Meyenberg brand	12 oz
	Dry Milk Powder	
	Vitamin A & D added, LOWFAT, DRY	12 qt, 8 qt, 3 qt
	Vitamin A & D added, NONFAT, DRY	12 qt, 8 qt, 3 qt
Cheese	American (Kraft - blue box), Cheddar, Colby, <u>Colby-Monterey Jack</u> , Monterey Jack, Mozzarella (whole or part skim), Swiss	16 oz. packages or less
DOMESTIC - NO FAT-FREE OR NON-FAT		
ONLY TYPES, MAY	NO SHREDDED, GRATED, SLICED, STRING, STICK,	

Food	Description	Quantity Authorized
BE REGULAR, LOW FAT OR REDUCED FAT	FLAVOR ADDED, IMPORTED, SERVICE DELI OR IMITATION CHEESE PRODUCTS. NO CHEESE FOOD OR SPREAD. NO INDIVIDUALLY WRAPPED SLICES.	
Eggs	LARGE, Fresh, Grade “AA” or “A”, White, Brown or Organic Valley	1 dozen
Infant Cereal  IRON FORTIFIED  NO FRUIT OR FLAVORINGS, CANS, JARS, OR PACKS - GERBER, HEINZ BRANDS ONLY	Barley, High Protein, Mixed, Oatmeal, Rice	8 oz., 16 oz.
Cereal  BRANDS ONLY, REGULAR FLAVOR UNLESS SPECIFIED  NO CEREAL IN INDIVIDUAL PACKETS	<u>COLD CEREALS</u> Banana Nut Crunch  Corn Biscuits/Crispy Corn: Albertson’s, Chex, Flavorite, IGA, Smith’s or Western Family  Corn Flakes: Country, <u>Flavorite</u> , IGA, Kellogg’s, Ralston, Safeway, Smith’s, Total or Western Family  Corn Puffs/Silly Spheres: Flavorite, <u>Great Value</u> , IGA, Kix Original, Ralston, Safeway, Smith’s or Western Family  Crispix  Frosted Mini Wheat Fiscuits: (regular or bite size) - Alvertson’s, Flavorite, IGA, Kellogg’s (no fruit	Up to 36 oz. total of any one or combination of cereal(s), as printed on WIC Food Instrument

Food	Description	Quantity Authorized
	<p>filled), Ralston or Western Family</p> <p>Honey Bunches of Oats: (Roasted or Almond)</p> <p>Life: Regular Only</p> <p>Nugget Type/Nutty Nuggets: Albertson's, Flavorite, Grape Nuts (no Grape Nut O's), IGA, Ralston, Safeway or Western Family</p> <p>Rice Biscuits/Crispy Rice: Albertson's, Chex, Flavorite, IGA, Smith's or Western Family</p> <p>Special K</p> <p>Toasted Oats/Tasteeos: Albertson's, Cheerios Original, Cheerios Multi Grain Plus, Flavorite, <u>Great Value</u>, IGA, Malt-O-Meal, Ralston, Safeway, Valley Fare or Western Family</p> <p>Wheat Flakes: Total Original, Wheaties Original</p>	
Cereal	<p><u>HOT CEREALS</u></p> <p><u>CoCo Wheats</u></p> <p>Cream of Wheat:: One Minute (white), Two and One-Half Minute (red) or Ten Minute (yellow)</p> <p>Malt-O-Meal: Plain or <u>Chocolate</u></p>	
<p>Juice</p> <p>VITAMIN C FORTIFIED - NO SUGAR ADDED</p> <p>Note: Individual-size</p>	<p>FROZEN CONCENTRATE (100% Juice)</p> <p>Apple Juice: Albertson's, Flavorite, IGA, <u>Old Orchard</u>, Safeway, Seneca (Red Label, Country Style or <u>Granny Smith</u>), Tree Top (Regular Only) or Western Family</p>	11.5 - 12 oz. only

Food	Description	Quantity Authorized
<p>servings may be purchased only if specified on the WIC check.</p> <p>NO JUICES WITH CALCIUM ADDED - NO JUICE DRINKS OR BEVERAGES</p>	<p><u>Apple Combination Juice: Old Orchard (Apple-Kiwi-Strawberry)</u>  <u>Grape Juice: Albertson's, Old Orchard or Welch's (Gold Cap)</u>  <u>Orange Juice: Any Brand</u>  <u>Orange-Combination Juice: Dole (Orange-Peach-Mango or Orange-Strawberry-Banana)</u>  <u>Pineapple Juice: Dole</u>  <u>Pineapple Citrus Combination Juice: Dole (Pineapple-Orange, Pineapple-Orange-Banana, Pineapple-Orange-Strawberry)</u>  <u>White Grape Juice: Albertson's or Welch's (Gold Cap)</u>  <u>White Grape Combination Juice: Welch's White Grape Classic (Peach, Pear or Raspberry)</u></p> <p><u>CANNED (100% JUICE)</u>  <u>Apple Juice: Albertson's, Seneca (Red Labe), Texsun, Tree Top or Western Family</u>  <u>Grape Juice: Welch's (bright purple can)</u>  <u>Orange Juice: Any Brand</u>  <u>Pineapple Juice: Albertson's, Del Monte, Dole, Flavorite, IGA, Private Selection, Safeway or Western Family</u>  <u>Tomato Juice: Albertson's, Del Monte, Flavorite, IGA or Western Family</u>  <u>White Grape Juice: Welch's (bright yellow can)</u></p>	<p>46 oz. only</p>
<p>Juice</p>	<p><u>CONCENTRATE CANNED (100% Juice)</u></p> <p>Apple: <u>Juice Makers</u>  Cherry: <u>Juice Makers</u>  Grape: <u>Juice Makers</u></p>	<p>11.5 oz. only</p>

Food	Description	Quantity Authorized
	<u>White Grape: Juice Makers</u>	
Legumes - Dry Beans/Peas/Lentils  Note: Canned beans may be purchased <u>only</u> if specified on the WIC check.	Black beans, Black-eyed peas, Cow peas, Crowder peas, Garbanzo beans, Great Northern beans, Kidney beans, Lentils, Lima beans (baby or large), Mung beans, Navy beans, Pinto beans, Red beans, Red beans (small), Soybeans, Split peas (green or yellow), White beans (small)	16 oz. (NO CANNED)
Peanut Butter  NO JELLY OR HONEY ADDED - NO REDUCED FAT PEANUT BUTTER SPREAD	Unflavored smooth, chunky or natural	16 - 18 oz. jar only
Tuna  CANNED, WATER PACKED ONLY  NO "DIET" PACK	White or light, solid or chunk	6 to 6.5 oz. cans
Carrots  NO BUTTER, SAUCES, OR SEASONINGS	Fresh (regular or baby), Canned (sliced, diced, baby or whole), Frozen (cut, baby or whole)	16 oz. package/container or less

## **Substitutions for Authorized Foods**

**Policy Number 8-5**  
**Effective Date: October 1, 1997**

### **Policy**

It is the policy of the Montana WIC Program that the only allowable substitution for an authorized WIC food is another WIC food of the same category in an equal or lesser quantity.

### **Background**

Authorized WIC foods are chosen for reasons specific to supplemental nutrition for women, infants and children. Other foods do not meet those reasons. However, due to inclement weather or other extreme conditions, deliveries of foods to stores may cause temporary inventory shortages. When a retail store runs out of a specific WIC food, a substitution is allowed.

WIC foods are provided for a specific participant and may not be shared, traded, sold, nor returned for cash or other products.

### **Rain Checks**

Rainchecks, or credit slips for food purchased with WIC checks, are not allowed.

Note: There is only one exception. If prolonged extreme circumstances, such as severe weather conditions occur, a retailer may request approval from the state WIC office prior to issuing rainchecks.

### **Food Exchanges**

Participants may not exchange WIC foods for non-WIC foods, for other WIC foods, for cash or for credit.

### **Food Spoilage**

If spoiled or otherwise unusable WIC food is being returned, retailers may only exchange returned WIC foods for another WIC food of the same category on a one-to-one basis.

### **Sizing**

WIC participants are not allowed to purchase larger sizes of a WIC food and pay the price difference.

### **Infant Formula**

Infant formula may not be returned to the retailer unless it is found to be spoiled or outdated. Excess formula must be returned to the WIC clinic. Participants who request an exchange of previously purchased formula for another formula must be referred to the WIC clinic.

### **Authority**

#### **Approval Signature**

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David L. Thomas, Nutrition Section Supervisor



## Authorized Foods Selection

**Policy Number 8-6**  
**Effective Date: October 1, 1997**

### Policy

It is the policy of the Montana WIC Program that specific foods will be selected for use in the Montana WIC Program through review by a panel of individuals using evaluation criteria.

### Review Panel

The panel will include local WIC program personnel, nutrition specialists, Montana Cooperative Extension Service, and state WIC Program staff.

### Review Criteria

Criteria for review include, but are not limited to the items listed below.

1. Compatibility of the food's nutrition message with the Montana WIC Program nutrition education goals.
2. Meets Federal guidelines for nutrition levels?
3. Is the product organoleptically acceptable?
4. What is the conceptual content of the product name?
5. Professional determination, based upon experience.
6. Are costs competitive with comparable foods?
7. Is the product available statewide?
8. Does the product have potential for product acceptance?

### Procedures

The table below describes the required procedures.

## Authorized Food Selection

Step	Action
1	<p>Submit suggested changes in writing between June 1 and June 30 to state WIC office, including:</p> <ul style="list-style-type: none"><li>• A description of the change (addition or deletion)</li><li>• A statement (references, scientific research, etc.) supporting the change</li><li>• A statement about how and why the change will impact the WIC Program statewide.</li></ul>

	Note: Food items and nutrition issues which have been evaluated and approved will not be removed or rescinded unless a formal request is made or there have been sufficient reformulation or research to warrant reconsideration.
2	The panel will review requests by August 30th. Additional information will be requested within 15 days of receipt of review request, if needed.
3	<p>A letter to the requestor will be sent by October 30th, notifying of either approval or disapproval.</p> <p>Note: Food items and nutrition issues which have been evaluated and rejected for approval will not be accepted for consideration for a two year period unless there has been sufficient reformulation or research to warrant reconsideration.</p>

**Authority**

**Approval Signature**

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David L. Thomas, Nutrition Section Supervisor

## Infant Formula and WIC-Eligible Medical Foods

Policy Number 8-7  
Effective Date: October 1, 2001

### Policy for Infant Formula

It is the policy of the Montana WIC Program that only one formula manufacturer be designated for supplying standard iron-fortified cow milk-based and soy-based formulas.

The standard infant formulas provided by the selected manufacturer will be known as contract brand infant formulas.

Within the selection of contract brand infant formulas, certain infant formulas require an appropriate prescription before issuance.

Please refer to Table 1 to determine which primary contract brand infant formulas may be interchanged or offered to infant participants without a prescription and which ones require a prescription.

**Table 1**  
**Contract Brand Infant Formula**

Interchangeable Contract Brand Infant Formula (no prescription required to issue)	Prescription Required Contract Brand Infant Formula
Enfamil LIPIL with Iron (cow-milk based) ProSobee LIPIL (soy-milk based) LactoFree LILIL (cow-milk based, no lactose) Gentlease LIPIL (cow-milk based, lower lactose)	Enfamil AR LIPIL (See addendum for thickened infant formulas) Enfamil Low Iron LIPIL (See Prescription Required Contract Infant Formula below)

All other infant formulas, standard or exempt, and WIC-eligible medical foods will be considered non-contract infant formulas. Issuance of any of these products will require an appropriate prescription.

Length of issuance may vary depending on the particular formula. See more information in the policy for the specific formula.

Please refer to Table 2 for examples of standard, exempt and WIC-eligible medical foods.

**Table 2**  
**Non-Contract Brand Infant Formula**

<b>Standard</b>	<b>Exempt</b>	
	<b>Infant Formula</b>	<b>WIC-Eligible Medical Foods</b>
Includes, but is not limited to: Good Start, Similac, Baby Basics, Parents' Choice, Alsoy, Isomil, Similac Lactose Free	Includes, but is not limited to: EnfaCare, Nutramigen, NeoSure, Alimentum, Lofenalac, Similac PM60/40, Pregestimil	Includes, but is not limited to: Kindercal, Pediasure, Phenyl-Free, Polycose, Neocate One+, Vivonex Pediatric

For infant use, food packages are designed to qualify as Food Package I and II

### **Contract Brand Infant Formula Requiring Prescriptions**

It is the policy of the Montana WIC Program that certain contract brand infant formulas will be considered for authorization/issuance only when a physician, nurse practitioner or physician assistant with prescriptive authority has determined the infant has a specific medical condition (listed below) which contraindicates the use of the contract brand standard iron-fortified formulas.

Currently, the two infant formulas identified which meet this criteria are:

- Enfamil AR (see the addendum regarding infant formula with a thickening agent for further information about appropriate diagnosis/justification and the length of authorization); and
- Enfamil Low Iron, which may be issued only for the following diagnoses/justifications:
  - hemolytic anemia in premature infants (only as long as the condition is present)  
This medical condition requires frequent blood transfusions at a rate which will result in iron overload if an iron-fortified infant formula is used; and
  - thalassemia.

Food instruments should be issued for only one month at a time for these infants so closer follow-up can occur. Food packages should be entered into the WIC automated system only through the authorization time period.

**See the section on “Contract and Non-Contract Formula Prescriptions” below.**

### **Non-Contract Standard Infant Formula**

It is the policy of the Montana WIC Program that non-contract standard formulas will be considered for authorization/issuance only when a physician, nurse practitioner or physician assistant with prescriptive authority has determined that an infant has a medical condition which contraindicates the use of all contract brand iron-fortified formulas which do not require a prescription for issuance. The formula justification must eliminate the use of all of these contract brand infant formulas and support the use of the specifically named non-contract infant formula.

Trials of all contract brand infant formulas which do not require a prescription must have been conducted and all such infant formula trials must have resulted in adverse reactions. Certain medical conditions may preclude the trials of both cow milk-based infant formulas (examples are hives, extensive body rash, or blood in the stools).

At most, authorization should be made for only a three month interval. Prior to continued authorization, retrials of all contract formulas which do not require a prescription must be conducted and all such infant formula trials must result in adverse reactions. Certain medical conditions may preclude the trials of both cow milk-based infant formulas (examples are hives, extensive body rash, or blood in the stools). A new prescription is required before continuation of approval is considered.

Food instruments should be issued for only one month at a time for these infants so closer follow-up can occur. Food packages should be entered into the WIC automated system only through the authorization time period.

**See the section on “Contract and Non-Contract Formula Prescriptions” below.**

### **Exempt Infant Formula and WIC-Eligible Foods for Infants**

It is the policy of the Montana WIC Program that exempt infant formulas and WIC-eligible foods will be considered for authorization/issuance only when a physician, nurse practitioner or physician assistant with prescriptive authority has determined that an infant has a medical condition which contraindicates the use of contract-brand standard iron-fortified formulas. Only products indicated for use with infants will be considered.

Unless a specific medical condition which precludes the use of a contract brand standard iron-fortified formula is diagnosed (i.e. phenylketonuria, cystic fibrosis or galactosemia), trials of all contract brand infant formulas which do not require a prescription must have been conducted and all such formula trials must have resulted in adverse reactions.

Certain medical conditions may preclude the trials of both cow milk-based formulas (examples are hives, extensive body rash, or blood in the stools).

Authorizations are generally granted until approximately six months of age and nine months of

age. Certain medical conditions or reactions at the six months of age trials may preclude a retriail of one or all contract brand infant formulas at nine months of age (examples are: hives, extensive body rash, or blood in the stools).

Prior to continued authorization, unless a specific medical condition precludes retriails, retriails of all contract brand infant formulas which do not require a prescription must be conducted and all such infant formula retriails must result in adverse reactions. A new prescription is required before continuation of approval is considered.

Food instruments should be issued for one month at a time for most of these infants so closer follow-up can occur. Food packages should be entered into the WIC automated system only through the authorization time period.

Note: Specific Exempt Infant Formula information is listed below or in an addendum for premature infant formula.

**See the section on “Contract and Non-Contract Formula Prescriptions” below.**

#### **Contract and Non-Contract Formula Issuance to Children and Women**

It is the policy of the Montana WIC Program that all contract and non-contract formulas, including exempt and WIC-eligible foods, will be considered for authorization/issuance only when a physician, nurse practitioner or physician assistant with prescriptive authority has determined that a child or woman has a medical condition which contraindicates the use of cow’s milk.

Unless a specific medical condition which precludes the use of cow’s milk is diagnosed (i.e. phenylketonuria, cystic fibrosis or galactosemia), a trial of cow’s milk or a cow’s milk product (i.e. cheese or yogurt) is expected before a special formula will be considered.

Enfamil with Iron may be considered for approval only in the following cases:

- medical condition that warrants tube feeding; or
- developmental delays that impact feeding skills (must be documented, as well as supported by a current 24-hour recall)

#### **Contract and Non-Contract Formula Issuance to Chilren and Women (continued)**

Goat’s milk is considered a non-contract formula for the Montana WIC Program.

All food packages are designed to qualify as Food Package III.

**See the section on “Contract and Non-Contract Formula Prescriptions” below.**

#### **New Formulas**

As a new formula or formula version enters the market, the WIC State Nutritionist(s) will determine whether it requires a prescription for issuance and whether or not it will be authorized for the Montana WIC Program.

### **Contract and Non-Contract Formula Prescriptions and Approvals**

Prescriptions for non-contract and special formula requests must include:

- date written (must be within 30 days of WIC request)
- **specific** brand name of the formula requested
- appropriate medical diagnosis/justification warranting the formula use
- length of time the formula is medically necessary
- signature of the requesting health care provider - may be a physician, nurse practitioner or physician assistant with prescriptive authority (may not be signed by an R.N. for a physician)
- typed or printed name of the requesting health care provider.

Faxed copies of prescriptions may be accepted for one month's issuance. The original copy of the prescription must be received in the local agency before further issuance.

A participant who transfers in from another state with a prescription for non-contract or special formula containing an appropriate justification may be issued the formula for one month until the participant may obtain another from a local health care provider. If the participant's regular local health care provider is in an adjacent state (as in border communities), the Montana WIC Program will accept his or her appropriate prescription.

### **Contract and Non-Contract Formula Prescriptions and Approvals (continued)**

A State WIC Nutritionist or local WIC Program Registered Dietitian may provide approval for issuance of contract brand infant formulas requiring a prescription and non-contract infant formulas when an appropriate prescription is provided.

An appropriate formula request form and current prescription must be present in the participant's chart for each authorization. WIC Program Registered Dietitians must send a copy of the approval form and the current prescription to the State Office in a timely fashion. WIC Programs using the State WIC Nutritionist for approvals must send a copy of the current prescription to the State Office in a timely fashion.

### **Policy for Religious Eating Patterns Exceptions**

It is the policy of the Montana WIC Program to accommodate, whenever possible, a request for an alternative standard infant formula based on religious eating patterns if a contract infant formula is considered inappropriate.

The current contract infant formulas meet the definition of Kosher. Enfamil with Iron and Enfamil LactoFree are Kosher with a dairy qualification. Enfamil ProSobee is Kosher with a

Passover qualification.

If a participant requests a non-contract standard infant formula for religious eating patterns, contact the State WIC Nutritionist(s) regarding the allowability of the request and the required documentation.

**Authority**  
7CFR 246

**Approval Signature**

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Terry Krantz, Manager, Nutrition Section



## **Infant Formula (Addendum)**

### **Background--Thickened Infant Formula**

Infant formula containing a thickening agent is not appropriate for all infants, even those with spitting up or simple (or minor) reflux. These formulas in general have the same calories per ounce (20) as standard infant formulas.

Enfamil AR, currently the only product on the market, has different levels of protein, fat and carbohydrate (some of these differences may be considered minor) than standard full term infant formulas. The carbohydrate is made up of 57% lactose, 30% rice starch and 13% maltodextrin. All other nutrient components with the exception of sodium and chloride are the same. The sodium and chloride are higher in the Enfamil AR than in standard Enfamil with Iron.

- ◆ The rice starch does not thicken until it comes into contact with the acid environment of the infant's stomach, therefore it is not an appropriate formula for swallowing disorders.
- ◆ There is a difference in the amount of rice starch added to the powdered and the ready-to-feed (RTF) forms of Enfamil AR. This is due to the heat processing that the RTF form undergoes which effectively increases the viscosity. Therefore, even though the RTF form contains less rice starch, the viscosity of both forms is the same.
- ◆ Despite the lower lactose content of this formula, it is not an appropriate formula for lactose intolerance without a diagnosis of GERD.
- ◆ Parents concerned about the sleeping pattern of their infant should not be encouraged to pursue a prescription for this formula.

### **Authorization/ Issuance of Infant Formula with a Thickening Agent**

As with non-contract formulas, a request for an infant formula with a thickening agent must be made with a prescription from the health care provider (with prescriptive authority) naming the specific formula requested and containing the diagnosis/justification for the named formula. (Refer to prior portions of Policy 8-7 in the State Plan for additional details about issuing special formulas.)

### **Acceptable Diagnosis or Justification**

An infant formula with a thickening agent may be issued for the following diagnosis/justification:

- Gastroesophageal Reflux (GERD)

An infant formula with a thickening agent will not be authorized for infants with spitting up or simple (or minor) reflux.

**Length of Authorization or Approval**

Authorization should be made for only a three month interval, at the most. Reassessment and a new prescription are required before continuation of approval is considered. Food instruments should be issued for only one month at a time for these infants so that closer follow-up can occur.

**Formula Not Currently Found in the System or Which Has Not Been Used Recently**

If the infant formula with a thickening agent requested is not currently in the WIC automated system, you must call and discuss its addition with one of the State WIC Nutritionists. It may take several days for these food package additions to be reflected on your computer.

Even if the infant formula with a thickening agent is currently in the WIC automated system, it may be necessary to update the price of the formula if no one in your region has issued it recently. You should check with the State Office about the current price listed for your region. If an update in price is necessary, it may take one to two days for the update to be reflected in your computer.

**Approval Signature**

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Chris Fogelman, Supervisor, Nutrition Section

## Infant Formula (Addendum)

### Sample Content for Letter to Health Care Providers (Thickened Formula)

(Date)

(Health Care Provider's Name)

(Address)

(City MT 59???)

Dear (Health Care Provider),

The Montana WIC staff have been asked a number of questions about infant formulas containing thickeners for use with Gastroesophageal Reflux (GERD). An example is: Enfamil AR. These formulas may be authorized for use in specific situations as a special formula. As with any special formula provided by the WIC Program, a prescription signed by a health care provider with prescriptive authority must be provided to the WIC clinic. The prescription must contain a diagnosis/justification supporting the use of the formula requested and the name of the formula.

The local clinic staff have been informed that infant formula with the additional thickening agent is appropriate in certain cases. Appropriate medical diagnosis/justification for issuing an infant formula containing a thickening agent is:

❖ Gastroesophageal Reflux (GERD)

Infant formulas with thickening agents are not appropriate for all infants with spitting up or simple (or minor) reflux.

Based on our information, infant formulas containing a thickening agent should be approved for no more than three months at a time. After three months, the need for the formula should be reevaluated and if the need continues, another prescription must be submitted.

Please know that the WIC staff will work with you and WIC families to ensure WIC infants' nutritional needs are best met. Please call the local WIC clinic at ??-??-?? or the state WIC office at 1-800-433-4298 if you have questions.

Sincerely,

(Name)

(Local WIC Clinic)

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## **Infant Formula (Addendum)**

### **Background--Premature Infant Formula**

Premature infant formulas are not appropriate for all premature infants. These formulas in general have higher calorie and protein amounts per ounce and different levels of minerals and vitamins than standard full term infant formulas. Eighty percent of an infant's bone mineralization occurs after 26 weeks gestation (in the third trimester). Individual need for additional calcium can best be determined by measuring the infant's alkaline-phosphate level.

- ◆ Infants born before or early in that development state will not have an adequate calcification at birth. A formula with increased minerals would be appropriate until mineralization has occurred.
- ◆ Most infants born in the late part of the third trimester may actually have an adequate calcification. Increased minerals in the formula would not be indicated.
- ◆ Some infants born in the late third trimester may have poor bone mineralization; for example very low birth weight infants or infants with a traumatic medical history. They may benefit from increased minerals due to the loss of calcium and phosphorus in the urine.

### **Authorization/ Issuance of Premature Infant Formula**

As with other non-contract formulas, a request for a premature infant formula must be made with a prescription from the health care provider (with prescriptive authority) naming the specific formula requested and containing the diagnosis/justification for the named formula. (Refer to prior portions of Policy 8-7 in the State Plan for additional details about issuing special formulas.)

A premature infant formula may be issued for the following diagnosis/justifications:

1. Documented osteopenia; or
2. Suspected osteopenia (with a traumatic medical history, which should be noted in the chart).

### **Authorization/ Issuance of Premature Infant Formula**

Premature infant formulas will not be authorized for premature infants with "slow or poor weight gain" or for "prematurity". Infants that test appropriate for bone mineralization should be issued other formulas, including if requested, standard Enfamil/ProSobee mixed to 22 or 24 calories per ounce.

### **Length of Authorization**

Authorization should be made for only a three month interval, at the most. Reassessment and a

new prescription are required before continuation of approval is considered. Food instruments should be issued for only one month at a time for these infants so that closer follow-up can occur.

**Formula Not Currently Found in the System or Which Has Not Been Used Recently**

If the premature infant formula requested is not currently in the WIC automated system, you must call and discuss its addition with one of the State WIC Nutritionists. It may take several days for these food package additions to be reflected on your computer.

Even if the premature infant formula is currently in the WIC automated system, it may be necessary to update the price of the formula if no one in your region has issued it recently. You should check with the State Office about the current price listed for your region. If an update in price is necessary, it may take one to two days for the update to be reflected on your computer.

**Approval Signature**

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Chris Fogelman, Supervisor, Nutrition Section

## Infant Formula (Addendum)

### Sample Content for Letter to Health Care Providers (Premature Formula)

(Date)

(Health Care Provider's Name)

(Address)

(City MT 59???)

Dear (Health Care Provider),

The Montana WIC staff have been asked a number of questions about infant formulas identified for use with premature infants. Examples include: EnfaCare, NeoSure and Enfamil Premature 24. These formulas may be authorized for use in specific situations as a special formula. As with any special formula provided by the WIC Program, a prescription signed by a health care provider with prescriptive authority must be provided to the WIC clinic. The prescription must contain a diagnosis/justification supporting the formula requested and the name of the formula.

Our local clinic staff have been informed that premature formula with the additional calcium and protein is appropriate in certain cases. Appropriate medical diagnosis/justification for issuing a premature formula is:

- ❖ diagnosed osteopenia, or
- ❖ suspected osteopenia (supported by a medical history of a very sick infant) Premature formulas are not appropriate for all premature or slow weight gain infants. Infants with adequate bone mineralization, but needing additional calories may benefit from other formulas.

Based on our information, premature formulas should be issued for no more than three months at a time. After three months, the need for the formula should be reevaluated and if the need continues, another prescription must be submitted.

Please know that the WIC staff will work with you and WIC families to ensure WIC infants' nutritional needs are best met. Please call the local WIC clinic at ???-???? or the state WIC office at 1-800-433-4298 if you have questions.

Sincerely,

(Name)

(Local WIC Clinic)

## **Infant Formula Samples**

**Policy Number 8-8**  
**Effective Date: October 1, 1997**

### **Policy**

It is the policy of the Montana WIC Program that no infant formula samples will be accepted by local WIC Programs nor will they be stored in the WIC clinic.

### **Returned Formula**

Infant formula returned to the WIC clinic must be disposed by the following methods.

- Donation to a local food bank or shelter
- Donation to community programs which provide food baskets/assistance
- Donation to the local public health nurse

Note: If you have a special formula, contact the State WIC Office regarding disposal.

### **Records**

Records of any donation, including a signed and dated receipt from the receiving entity, must be maintained.

### **Authority**

### **Approval Signature**

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David L. Thomas, Nutrition Section Supervisor

## Food Instruments Destroyed in House Fire

**Policy Number 8-9**  
**Effective Date: October 1, 2005**

### **Policy**

It is the policy of the Montana WIC Program that food instruments destroyed in a house fire after printing and acceptance by a certified participant will be reissued **only if documentation exists of the fire.** Only the uncashed food instruments will be reissued. Redeemed food instruments and the food they provided will not be replaced.

A report from the Fire Marshal, insurance company or a newspaper article verifying there was an actual fire which destroyed the home article will constitute in-hand documentation. Keep a copy in the participant's chart.

If checks are reissued other than for destroyed in a house fire (documentation does not support reissuance of the food instruments), notice will be given to the clinic of action(s) to be taken during monitoring and contract renewal.

### **Attached Form**

The attached form "Report of Food Instruments Destroyed in House Fire" must be signed and placed in participant file.

### **Authority**

### **Approval Signature**

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Chris Fogelman, Manager, Nutrition Section



**REPORT OF  
FOOD INSTRUMENTS DESTROYED IN HOUSE FIRE**

I \_\_\_\_\_ have provided the WIC Program with a  
Participant Name  
police report, fire marshal report, or newspaper article verifying that food instruments  
have been destroyed in a house fire. This verification and explanation of  
procedure was provided to me by the WIC Program staff.

Further, I understand that if I have knowingly falsified information in order to receive  
additional benefits, I am subject to one month disqualification from the WIC Program for the  
first offense, three months disqualification for the second offense, or possible disquali-  
fication from the WIC Program.

\_\_\_\_\_  
Participant Signature/Date

\_\_\_\_\_  
WIC Staff Signature/Date

(This form must be signed and kept in the participant file.)

## Food Instrument Misnumbering

**Policy #: 8-10**

**Effective Date: December 1, 1999**

### **Policy**

It is the policy of the Montana WIC Program to impose a monetary penalty on local programs who issue misnumbered food instruments.

### **Misnumbered Food Instruments**

Food instruments must always be checked for accuracy before giving them to a participant. This would include, but is not limited to, verifying that the red pre-printed FI number matches the computer generated number.

When food instruments are misnumbered, without being corrected by the clinics on the day of error prior to running End of Day Reports, there is an immense impact on both the State WIC Office and the contracted bank. Extensive time is necessary for bank and state staff to research misnumbered food instruments processed through the banking system. Additionally, a service charge is imposed by the bank for the misnumbered food instruments.

Unresolved misnumbered food instruments also leave the state WIC system vulnerable to error due to the contracted bank method of paying food instruments based on the red preprinted number, and the state WIC system's control of food instruments based on the computer generated black number.

This creates an error because the payment does not match the issuance record and will result in an audit finding. Misnumbered food instruments may also result in the misreporting of infant formula redemption, causing serious funding issues.

### **Prevention**

Misnumbering is avoidable and instructions and guidance have been provided that, if followed, eliminates the risk of misnumbering (Tips & Tricks, #SFY 00-56, Oct. 15, 1999). Agencies should review this guidance with staff to confirm that procedures are implemented and followed.

### **Misnumbered FI's Penalty**

As a means to offset the additional costs incurred as a result of misnumbered food instruments, the Montana WIC Program will impose a monetary penalty of \$5.00 per food instrument which is misnumbered, given to the participant, and not corrected prior to completion of End of Day procedures on the day of issuance.

### **Authority**

### **Approval Signature**

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Terry Krantz, Manager, Nutrition Section

## Food Instrument Inappropriate Void/Reissue

**Policy #: 8-11**

**Effective Date: December 1, 1999**

### **Policy**

It is the policy of the Montana WIC Program to impose a monetary penalty on local programs who inappropriately void/reissue food instruments.

### **Inappropriate Void/Reissue**

All food instruments must be appropriately voided/reissued. Food instrument series that are broken (1 of the food instrument(s) cashed in a given month) cannot be voided/reissued until the following month, unless the void/reissue is for an infant formula package.

Void/reissue of infant formula food packages can only be done with an appropriate diagnosis and progressive change from standard to special formula. **Note: See policy 8-7 regarding infant formula issuance.**

This policy does not effect properly reported stolen food instruments. See Policy 8-10.

Your clinic will get one warning before a penalty is imposed.

### **Penalty For Inappropriate Void/Reissue**

Per the contract between your Local Agency and the State Office, your agency is responsible for any WIC funds misspent due to negligence of its employees.

For any inappropriate voided/reissued food instruments, we will charge your agency for the value of the incorrectly voided food instruments.

Any penalty will be reflected as a reduction in your monthly reimbursement.

### **Authority**

### **Approval Signature**

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Terry Krantz, Manager, Nutrition Section

## WIC Food Benefits

### Food Benefits

The CPA determines who may receive more than one month of food instruments at a time based on established clinic guidance and the participant. Assess each participant for:

- 1) The need for monthly nutrition education contacts or visits.
  - High risk participants require monthly contacts as stated in Policy 5-14.
  - Certain groups of participants need monthly contacts, for example, all pregnant women for the first 3 months of pregnancy certification and infants less than four months of age.
  - Certain participants may be seen monthly by individual local agency guidelines, such as all Priority 1 pregnant women. These guidelines must be at least as thorough as State WIC standards.
  - Multiple month issuance may be based on each individual's need for contacts, rather than on a category or group need.
- 2) The participant's ability to cope with two or more months of food instruments at a time.
  - The participant must be able and willing to cash food instruments only in the month for which they are issued.
  - The participant must safeguard the food instruments for the multiple month period.  
**Misplaced food instruments will not be replaced.**
- 3) The CPA always reserves the right to change a participant from multiple month issuance to monthly or vice versa during a certification period because of a change in nutrition status, need for contacts or misuse of food instruments.
- 4) If one member of a family is issued food instruments on a monthly basis, all members of the family shall be issued food instruments monthly.

This is to ensure that the individual needing monthly issuance receives food instruments each month and does not miss months because other family members have already received their food instruments for the month.

- 5) **Two nutrition education contacts must still be offered for each six month certification period.** With fewer visits to the clinic this must be monitored carefully to ensure compliance.

## WIC Food Instruments

### Procedures for WIC Food Instruments

Listed below are procedures for local agencies to follow when issuing food instruments to participants:

**Do not pre-print** food instruments. Food instruments are only to be printed when the participant is present in your clinic. The only exception is when you are mailing food instruments (see procedure for mailing WIC food instruments, pg. 8-55).

- A maximum of three months of food instruments may be issued at one time, based on CPA decision (see WIC Food Benefits, pg. 8-51).
- One, or at the most two, months of food instruments is recommended to be issued if the participant is high risk (see WIC Food Benefits, pg. 8-51).
- Only one month's of food instruments should be issued if the participant is **a walk-in, a proxy for the participant, using presumptive eligibility or using the zero income statement** as income documentation.

After the food instruments have been printed, instruct the participant to verify the food package as discussed with the CPA, (canned vs. frozen juice, # of gallons of milk, lbs. of cheese, etc.), then have the participant sign the first and last FI stubs and initial all stubs in-between. If the printed FI's become separated, the participant must sign the stubs per the above instructions for all sets of printed food instruments.

**NOTE: BE SURE THE FOOD PACKAGE IS CORRECT BEFORE ISSUING.** (See policy 8-11, pg. 8-50, FI Inappropriate Void/Reissue)

- **If the participant uses one check in a series of three and then requests a different food package, the change cannot be made until the next month's full food package. The only exception is for an infant formula package change from one brand of formula to another.**

After the participant has signed/initialed the FI stubs, tear off the stubs, place the FI's in the ID folder and give the ID folder to the participant. FI stubs should be filed in numerical order by date issued. FI stubs shall be kept for a time period as described in Records Management, pg 4-A-56.

### Proxies

**Definition:** An individual, designated by the participant/parent/guardian, with the authority to attend nutrition education appointments and to pick up and sign for food instruments.

A proxy may be allowed to attend WIC appointments for a participant/parent or guardian **with the exception of certification/subcertification visits.**

Designation of the proxy must be made prior to the appointment with a written, signed and dated note by the participant/parent/guardian. Written designation of a proxy must be made for each separate appointment.

**Note: Signing as a proxy on the ID packet does not allow an individual to pick up food instruments at the WIC clinic, only to cash FI's at the retailer.**

Proxies must show identification (and a written note per above) to pick up and sign for food instruments for participants. See pg. 5-65

Instruct the participant/parent/guardian they are responsible for their proxies actions. If the proxy commits fraud/abuse per the state plan, the participant/ parent/guardian will be held responsible and sanctioned accordingly.

- Proxies may be designated when the participant is medically or physically indisposed, or when unforeseen events prohibit travel to the clinic.
- Proxy notes are to be kept in the participant file.
- Before allowing the use of a proxy, the local WIC program shall consider whether there are adequate measures for the provision of nutrition education and health services to the participant when a proxy is used. If necessary, other arrangements may be made so the participant will receive necessary services.
- Instruct the proxy on the use of WIC checks. Also inform the proxy of their right to report improper practices by the food retailer.
- Food instruments may be redeemed by the proxy or by the participant/ parent/guardian. Signature of the proxy and participant/parent/ guardian must be on the WIC ID packet for signature verification by the food retailer.

#### **Mailing Food Instruments**

- WIC food instruments may be mailed to individual participants for the following reasons:
  1. Imminent childbirth, illness in the family or inclement weather. **Mail only one month of FI's.**
  2. Computer failure. If during a WIC clinic you experience computer and/or printer

failure, continue to hold clinic and determine WIC (sub) certifications. Food instruments may be mailed after the hardware failure is fixed. **Up to three months of FI's can be mailed in this instance.**

In the above situations the CPA or Aide would sign the food instrument stubs for the participant. When the hardship is resolved, the mailing of food instruments shall be discontinued.

- **Food instruments must be mailed certified or registered mail.**

Note: If an ID folder must be mailed, mail separately from food instruments (certified or registered) to prevent fraud.

- Mailing of food instruments shall never occur for more than three months in a row, as the participant must return to the clinic after that time to receive health and nutrition education services.
- Mailing of the food instruments, including the reason, must be documented in the participant's file for each relevant month.

#### **WIC ID Packet**

- Must be used by all local programs.
- Instructs participant/parent/guardian on how to use the food instruments.
- Includes a place for the authorized participant/parent/guardian/proxy signature to be used for identification purposes.
- Must be signed by participant/parent/guardian in presence of WIC staff.
- Must have active WIC participant(s) name(s) & ID number(s).
- Has space for the local WIC clinic to add its address and telephone number (required).
- Has appointment schedules.
- Should contain a list of authorized foods (stapled to inside of packet).
- Protects the food instruments.

#### **Retailer Responsibilities**

- Check that the dates on the food instruments are valid. **Do not accept** FI's before the "First Day of Use" or after the "Last Day to Use."
- Retailer's staff totals the WIC foods purchased, checking that the foods are specified on the food instrument (see Section on Retailers.) Ask the WIC participant about missing foods before entering a dollar amount on the FI. The **actual purchase price** of the foods is then written in by the clerk in the "Actual \$ Amount of Sale" box.
- If the food instrument is correctly completed, the food retailer has the participant sign the food instrument in the box "Signature of participant or authorized proxy."
- The retailer has 30 days from the "Last Day to Use" on the food instrument to deposit the food instrument.



## **Food Delivery System**

### **State WIC Agency Responsibilities**

1. Providing a uniform food instrument (FI) which is similar in appearance to a check. This FI is used by all local programs.
2. Maintaining an inventory of FI's on hand and order replacement FI's as needed.
3. Paying retailers in a timely manner. The retailer is reimbursed when he presents the WIC FI to his bank for payment within 30 days from the last date to use. The FI's are then presented through the Federal Reserve System to Financial Services & Management Corporation, Lake Lillian, MN, with whom the State WIC Agency contracts to perform services.
4. Establishing a contingent revolving fund for the WIC Program at Financial Services & Management Corporation, Lake Lillian, MN, with whom the State WIC Agency contracts to perform services. Each day the bank presents the State Office with a statement showing the amount of FI's paid. The bank is reimbursed for this amount through the use of a telephone transfer system.

### **Food Instrument Design and Information**

The FI lists the foods authorized by generic and/or brand name, amounts and a "Not to Exceed" price (in place of an estimated amount). The first and last days to use are listed on the food instrument. The check sequence number, participant ID number, the participant name, food package number and clinic number are also printed.

A space is provided for the retailer cashing the FI to enter his/her assigned stamp. Space is provided for the signature of the participant. The signature is obtained when the participant purchases the allotted food and after the clerk enters the purchase total in the "Actual \$ Amount of Sale" block. The signature is used by the retailer for verification of identification with the signature on the WIC ID packet.

WIC FI's contain pre-printed numbers at the top and bottom of the FI (magnetic ink character recognition - MICR). These pre-printed numbers identify the Federal Reserve Bank, the local bank and the account number. After the FI is paid, the amount paid is added by the bank.

### **Reconciliation of Food Instruments**

- A current retailer data base is sent to the bank when changes are made.
- Price lists are also sent to the bank on a periodic basis as changes are made.
- The daily transactions are sent to the bank. This information includes the numbers and maximum cashed value for checks issued by the local clinics during the day, checks voided by the local clinics during the day and new retailer payment transactions approved by the State WIC Agency.

- Upon receipt of this information, assuming the check passes all validations, the bank will pay the check. The bank may reject a check for a variety of reasons:
  - No/Illegible Retailer Stamp
  - Missing Signature
  - Redeemed Too Late
  - Altered Not to Exceed Amount
  - Stop Payment
  - Not on Issued File
  - Altered Food Package
  - Other
  - Invalid Retailer Number/Inactive Retailer
  - Redeemed Too Early
  - Excessive Dollar Amount
  - Purchase Price Missing/Illegible
  - Altered \$ Amount
  - Voided FI\*
  - Already Paid

Note: \*Voided FI's are paid by the bank and originals sent to the State WIC office for investigation.

- Adjustments to checks are made when an error occurs during the bank processing.
- When the bank completes a payment, rejection or adjustment transaction, a record is written to an output file and it is sent to the State Host machine to update the WIC system with the bank activity on a nightly basis.

#### Reconciliation of Food Instruments

If	Then
the check is paid by the bank	the amount paid and date of payment fields are updated
the check is adjusted	the amount adjusted field and bank process date are updated
a check is rejected by the bank	the reason for rejection is updated

A monthly close-out is reported on the FCS-498 (Monthly Financial and Program Status Report). The information for any closed out month includes whether or not every issued food instrument has been redeemed, expired, voided, or payment has been stopped.

Records in support of the FCS-498 are maintained in the State WIC Office.

#### Local WIC Program Responsibilities

- Issue FI's to eligible participants for authorized foods.
- Obtain participant/guardian signatures/initials on FI stubs and file them in order by date and FI number.
- Maintain a file of End-of-Day Reports which include the food instrument log (a listing of all FI's issued or voided for the day).  
Review the End-of-Day food instrument log and account for FI's issued and any gaps in sequence.  
FI's voided and/or returned are to be filed with that days FI stubs.

**Note: If a participant forgets to sign the FI stub, the staff member signs the stub, makes a notation on it and on the End-of-Day listing.**

- Keep FI's locked in a secure place. Local programs are responsible for stolen or lost FI's via the Local WIC Agency Agreement (see Policy 8-44). They are also responsible for reporting stolen FI's to the State WIC Agency so the State WIC Agency can handle stop payment procedures.
- Local WIC agencies are **financially** responsible for FI's mishandled by local program staff.
- Local agencies are **financially** responsible for inappropriately issued FI's.

**Companies with whom WIC Contracts**

**Automation Contractor:** Andersen Consulting, 717 17th Street, Suite 2000, Denver, CO 80202.

**Infant Formula Rebate Program Designer:** Gold Systems, PO Box 4644, Park City, UT 84060.

**Automated Food Instrument Printer:** Moore Business Forms, 300 Centreville Rd., Warwick, RI 02886.

**Banking Services:** Financial Services & Management Corporation, 451 Lakeview St., Lake Lillian, MN 56253.

**Temporary Services:** Express Personnel Services, PO Box 99468, Oklahoma City, OK 73199.

## **Cost Containment Initiative**

### **Description**

The Montana WIC Program has entered into a competitive sole-source retail system contract for approved and authorized infant formula. The foods procured will include milk and soy-based infant formulas in concentrate, ready-to-feed, and powdered forms.

All manufacturers registered with the Department of Public Health and Human Services (DPHHS) whose products fulfill the Infant Formula Act requirements have been offered the opportunity to bid on the initiative. In compliance with 7 CFR part 3017, certification will be included in contractors agreements that they and any subcontractors have not been debarred or suspended.

All manufacturers registered with the Department of Public Health and Human Services (DPHHS) whose products fulfill the Infant Formula Act requirements will continue to be allowed to sell special formula to Montana WIC participants through participating retailers whether or not they offer a rebate on WIC infant formula.

### **Calculations**

The Montana WIC Program, using the automated system, calculates the number of cans of formula, by brand and type, purchased each month. The State WIC Office will compile the information by the 45th day following the month of issuance.

Claims will be filed on a monthly basis with reimbursement to DPHHS due in 30 days from receipt of invoice. All claims submitted by DPHHS will be mailed by certified letter, return receipt requested, within forty-five (45) days of the end of each month.

### **Contracts**

Any contracts signed with companies to implement this initiative shall stipulate that the products meet the provisions of the Food, Drug and Cosmetic Act as it relates to infant formula.

### **Time Period**

The Montana State WIC Program has a new sole-source contract with Mead-Johnson to provide (Enfamil with Iron, ProSobee and LactoFree) effective October 1, 2001 through September 30, 2004. This initiative will be for a thirty-six month period, with the option of extensions which shall not exceed a total contract period of five (5) years.

### **Rebate Initiative**

This rebate initiative will be implemented statewide. No changes to the current food delivery system are planned. The existing food instrument will be retained unchanged.

Public comment was solicited by publication of our intent to amend the State Plan in the legal advertisement section of major newspapers in the State.

The goal of this initiative is to establish a program whereby part of the cost of infant formula provided under the WIC Program is rebated to DPHHS by eligible providers allowing WIC to serve more than 10,000 additional unserved persons.

**Conversion of Food Dollars**

A request may be made to convert food dollars to administrative dollars if Montana reaches a specific participation count designated by the USDA.